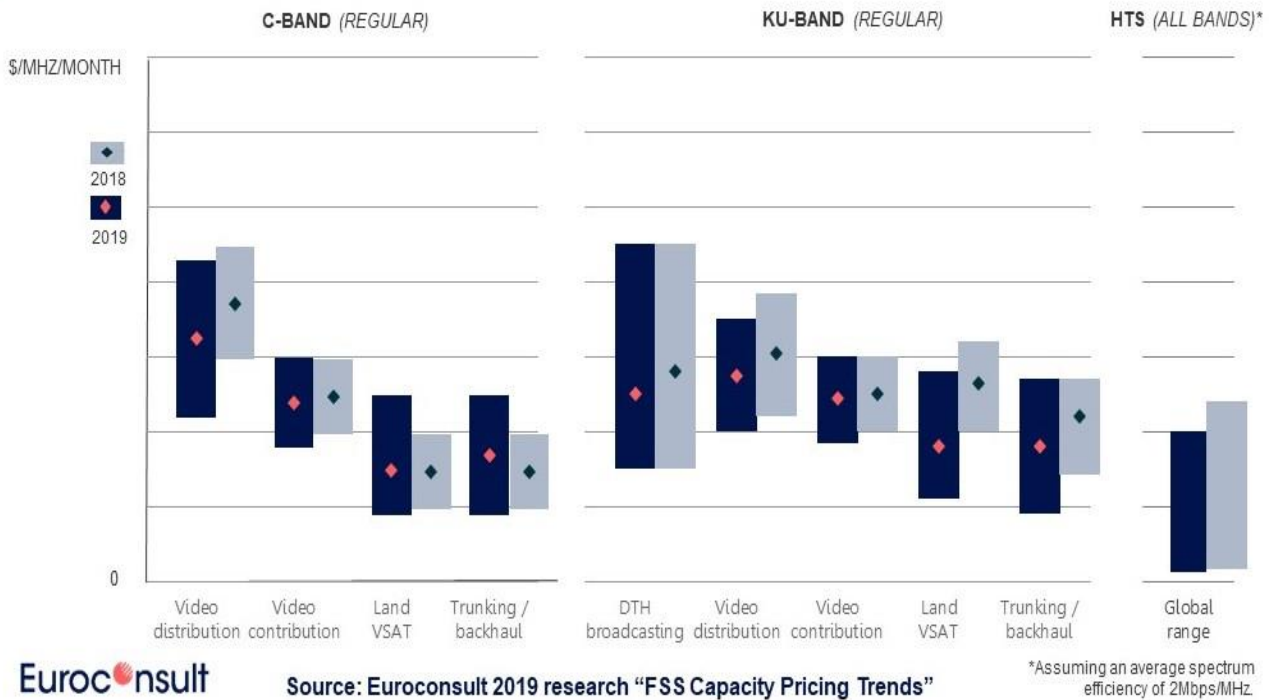


An assessment of the current dynamics for the pricing of satellite capacity

FSS Capacity Pricing Trends

CAPACITY PRICING COMPARISON FROM 2018 TO 2019 IN LATIN AMERICA



Euroconsult details pricing for traditional C-band, Ku-band and High Throughput Satellite (HTS) capacity broken out by contracts, regions, spectrum bands, and applications. The report shows that as the growth of satellite capacity on orbit slows, pricing levels per megahertz (MHz) for regular capacity and per megabits per second (Mbps) for HTS capacity have both stabilized at lower rates of decline and are projected to continue that trend through 2020.

Based on hundreds of data points spanning nearly all segments, frequency bands, and regions, the report uncovered broadening price disparity. It cites capacity pricing as low as \$800 per MHz per month for data applications in regions such as Sub-Saharan Africa, Russia, and Central Asia, and notes market resilience with pricing remaining as high as \$8,000 per MHz per month in important orbital hot spots for video broadcasting. While the cost per Mbps for HTS capacity has trended lower in the past 12 months, demand for high-quality HTS capacity in certain bands and regions has exceeded supply, enabling stable pricing in those markets.

Euroconsult notes that the double-digit pricing declines that were observed in the years prior to 2018 are now rare and limited to several localized markets. However, the research firm projects that today's pricing stabilization is likely to be short-lived for data-oriented applications as a massive volume of attractively priced supply from Very High Throughput Satellites (VHTS) and Non-Geostationary-Satellite Orbit (NGSO) constellations currently under construction, is expected to enter service in 2021.

The research includes an analysis of how pricing parameters have evolved over the past 12 to 18 months and documents average and specific pricing data points. It includes a table with detail on more than ten actual satellite capacity lease contracts in the 2018 to 2019 time period and provides analysis of the factors impacting capacity pricing. The report also reviews the evolving cost of building and launching FSS, HTS and NGSO satellites.



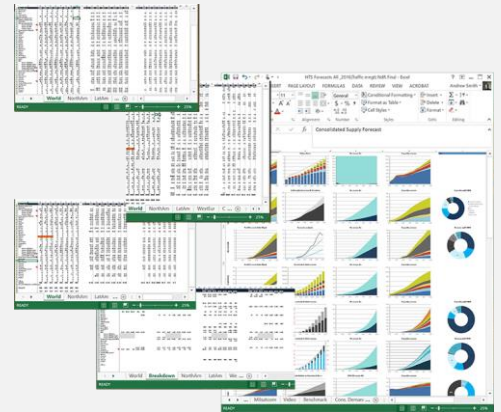
ABOUT FSS CAPACITY PRICING TRENDS

While the first edition of the FSS Capacity Pricing Trends established **new pricing grids** for satellite capacity, including **both pricing ranges and indicative reference prices**, this second edition of the report places an additional focus on how **these pricing parameters have evolved over the past 12 to 18 months**, including In-depth analysis of the evolving cost base of capacity for GEO-HTS, NGSO-HTS and regular satellites.

EXTENSIVE FIGURES & ANALYSIS OF THE LAST 2 YEARS

All Euroconsult reports have, at their core, data derived from over 30 years of tracking all levels of the satellite/space value chain. To this we add dozens of dedicated industry interviews each year, along with the continual refinement of our data models, and the collection and interpretation of company press releases and financial filings. Our consultants have decades of experience interpreting and analyzing our proprietary databases in light of the broader value chain.

When you purchase research from Euroconsult, you receive thousands of data points and the expert interpretation of what this means for specific verticals and sectors of the satellite value chain, including forecasts based on years of data and highly refined models.



THE REPORT INCLUDES:

- ✓ Latest pricing grids for satellite capacity by region
- ✓ Differentiated pricing ranges by application and frequency band
- ✓ Benchmark of price variations over the past 12 months
- ✓ Dedicated price grids for mobility applications
- ✓ Historic evolution of cost base of capacity

A MUST READ FOR:

- ✓ Satellite Operators
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- ✓ Satellite service providers
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LATEST FSS CAPACITY PRICING TRENDS

FSS Capacity Pricing Trends provides an assessment of current dynamics for the pricing of satellite capacity, in a context of sustained technology innovation and additional satellite capacity associated with new generation satellites. The report includes coverage of nine regional markets, together with a specific review of the mobility and government vertical markets.

Capacity pricing trends detailed by region

- ✓ North America
- ✓ Latin America
- ✓ Europe
- ✓ Russia & Central Asia
- ✓ South Asia
- ✓ Southeast Asia
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- ✓ Sub Saharan Africa
- ✓ Oceania & Pacific



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